

Logging Interactions on Engagifii

14 Steps [View most recent version](#) 

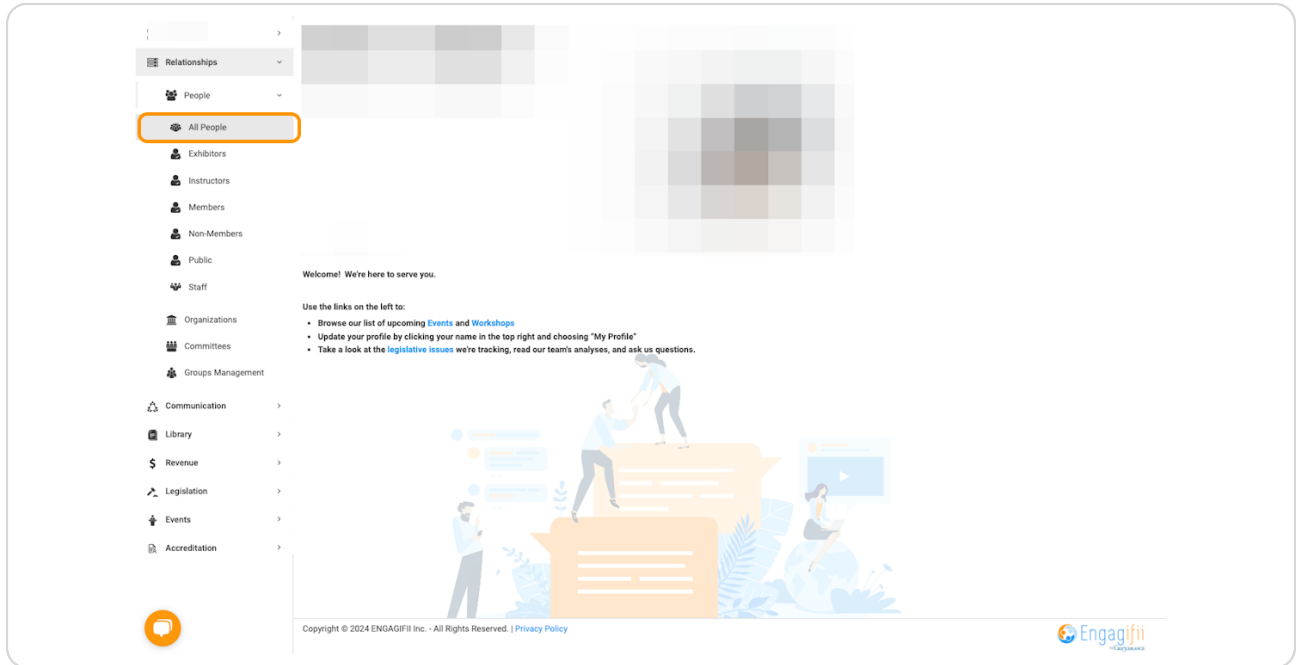
Created by
Engagifii Inc.

Creation Date
February 29, 2024

Last Updated
February 29, 2024

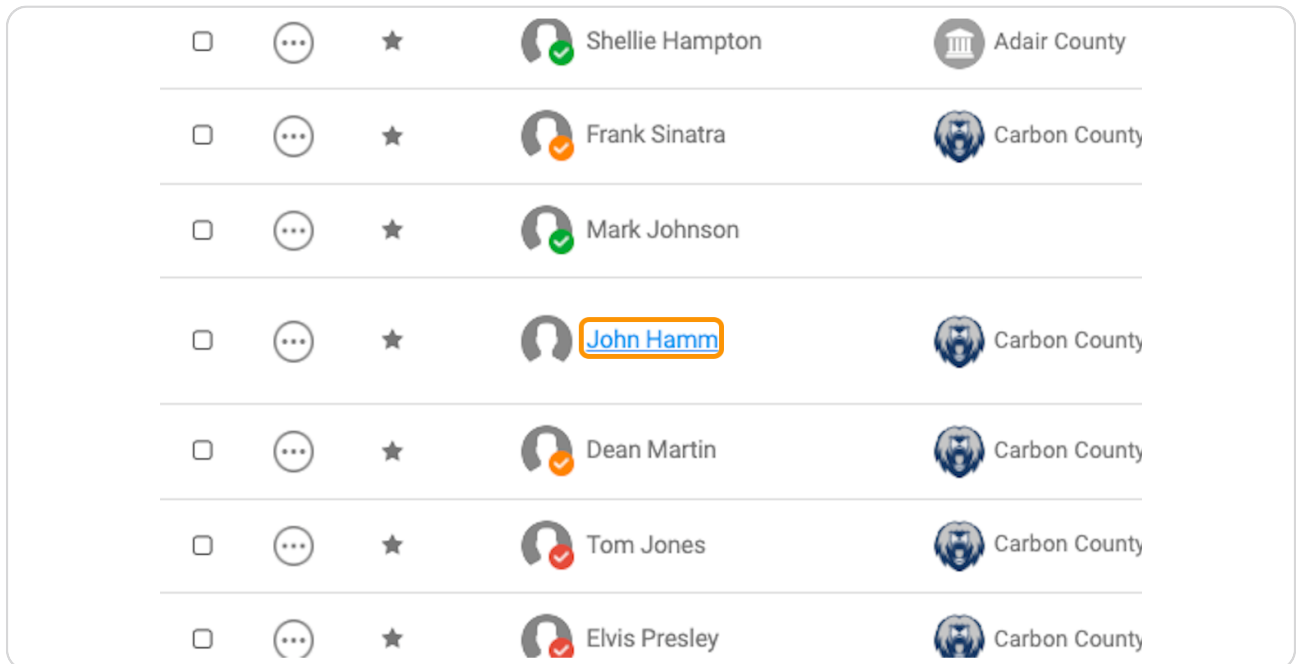
STEP 1

Click on Relationships, People, then All People



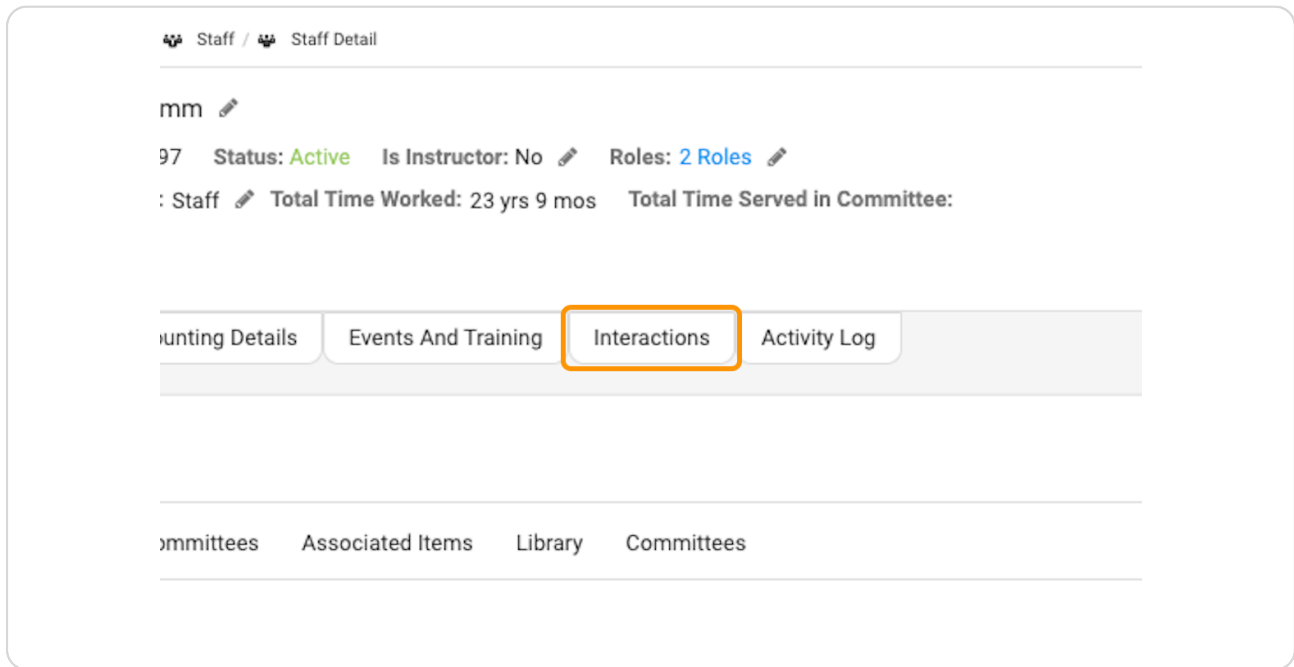
STEP 2

Click on the person you wish to record an interaction






STEP 3


Click on the Interactions tab



Staff / Staff Detail

mm 

97 Status: Active Is Instructor: No  Roles: 2 Roles 

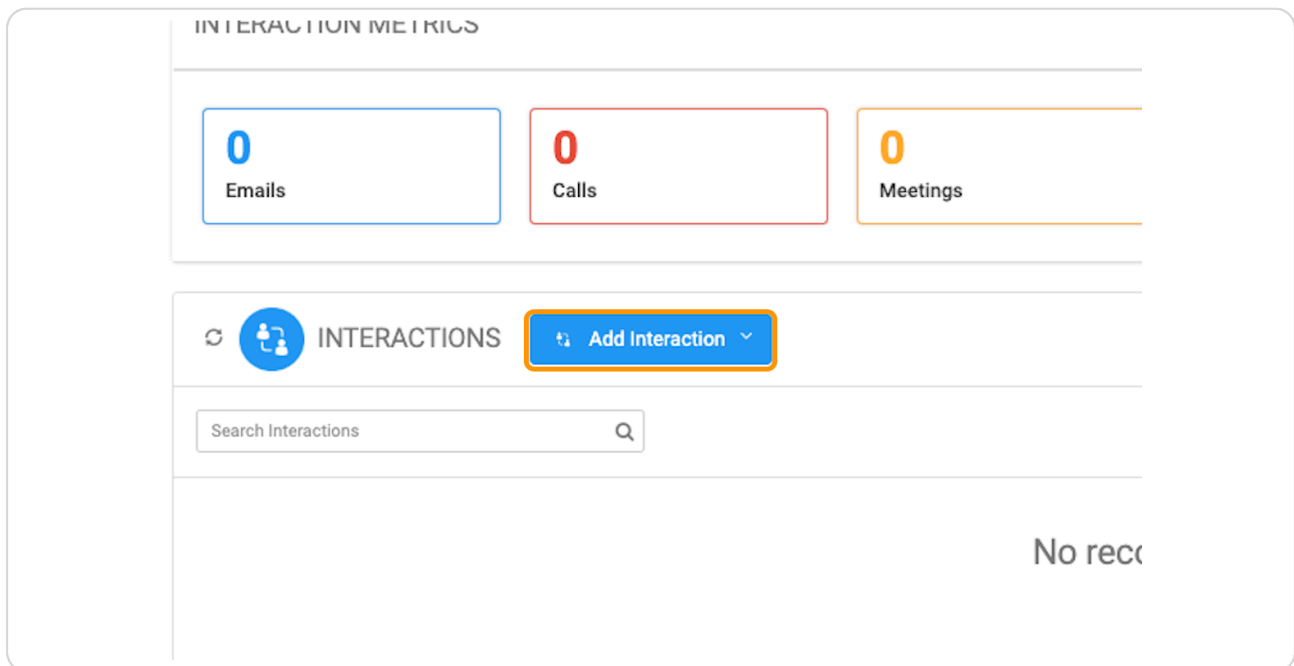
: Staff  Total Time Worked: 23 yrs 9 mos Total Time Served in Committee:

Accounting Details Events And Training **Interactions** Activity Log

Committees Associated Items Library Committees




STEP 4


Click on Add Interaction



INTERACTION METRICS

0 Emails 0 Calls 0 Meetings

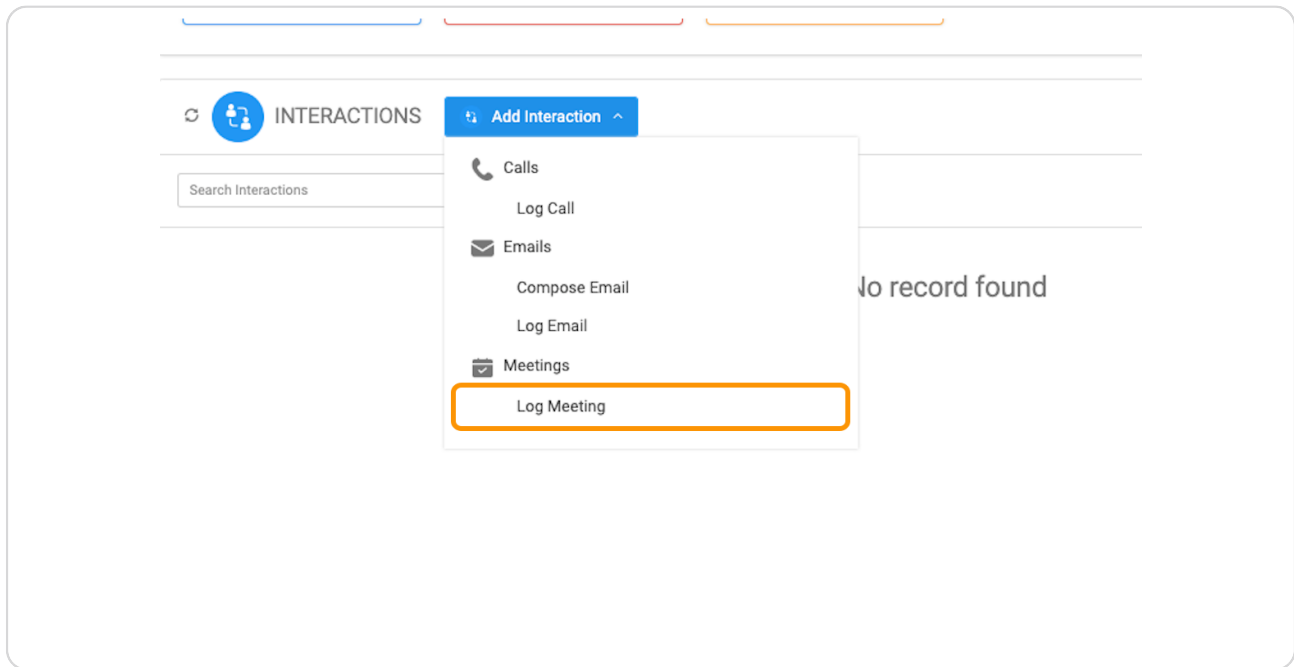
  INTERACTIONS **Add Interaction** 

Search Interactions 

No records

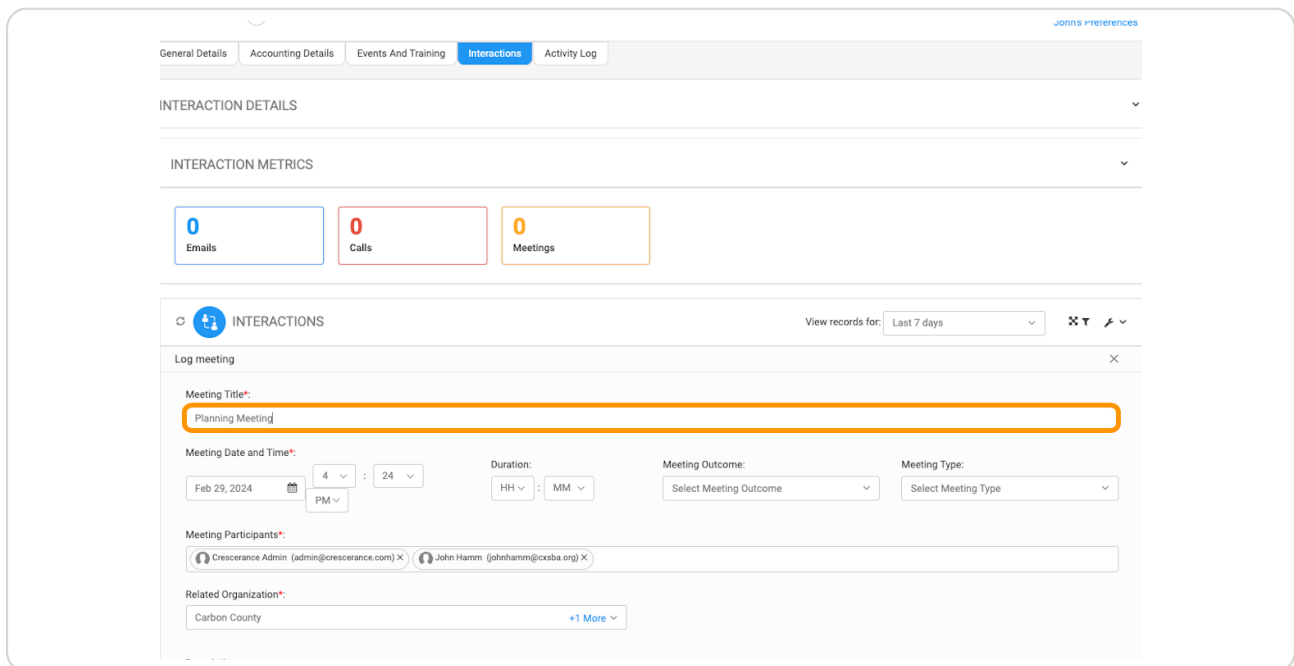
STEP 5

Click on the type of interaction you wish to create - Call, Email or Meeting



STEP 6

Type your Meeting Title



STEP 7

Add your meeting date, time and duration

The screenshot shows a form with several sections: 'ETAILS', 'METRICS', and 'REACTIONS'. The 'METRICS' section contains two boxes: 'Calls' with a red '0' and 'Meetings' with an orange '0'. Below this is the 'REACTIONS' section with a 'View records' link. At the bottom, there is a 'Meeting Time*' field with a red underline.

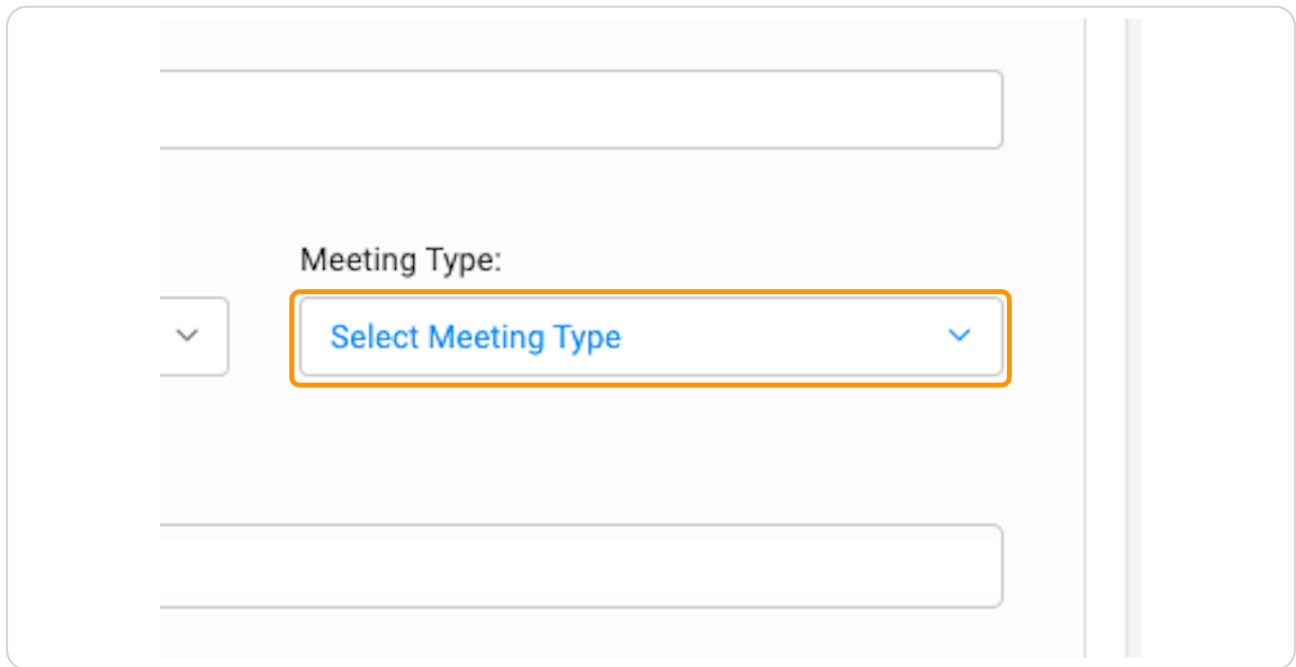
STEP 8

Click on Select Meeting Outcome to enter the correct outcome or add a new one

The screenshot shows a form with several fields: 'on:' with a dropdown menu showing 'MM', 'Meeting Outcome:' with a dropdown menu showing 'Select Meeting Outcome', and 'Meeting Type:' with a dropdown menu showing 'Select Meeting Type'. Below these fields is a text input field containing 'nm@cxsba.org) X' and a '+1 More' dropdown menu.

STEP 9

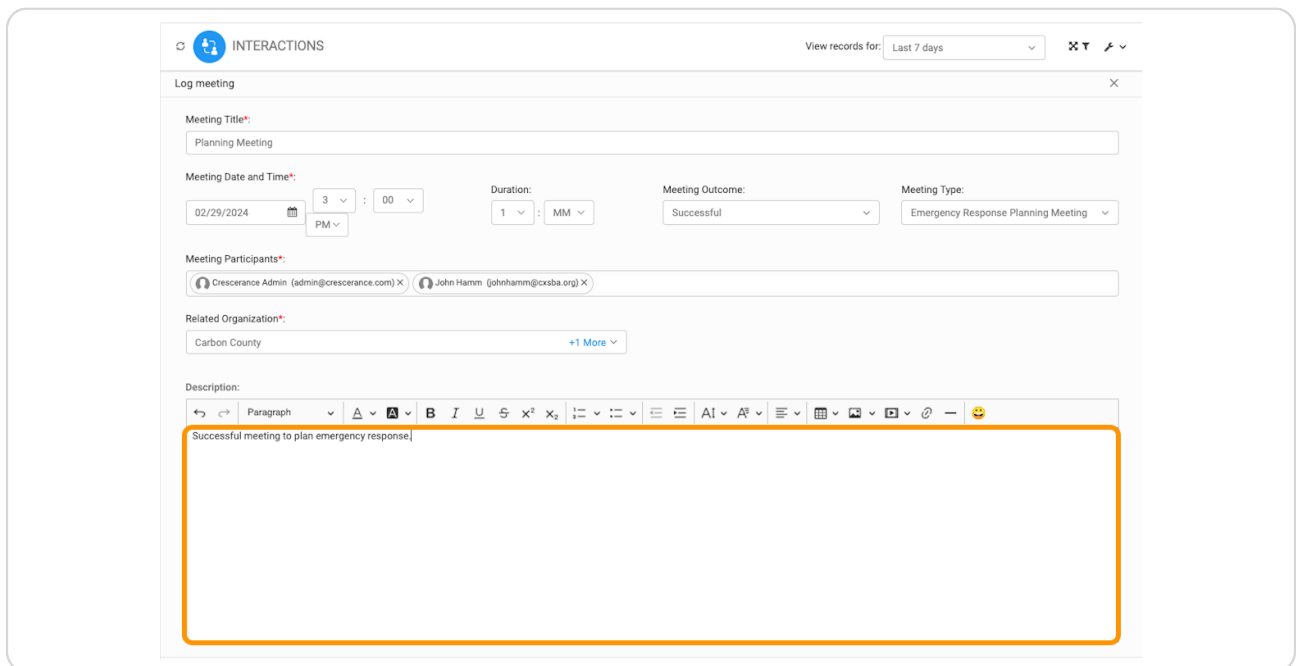
Click on Select Meeting Type to add or create a meeting type



A screenshot of a web interface showing a dropdown menu for selecting a meeting type. The text "Meeting Type:" is positioned above the dropdown. The dropdown menu is open, displaying the text "Select Meeting Type" in blue, which is highlighted by an orange rectangular box. There are small downward-pointing chevrons on either side of the text. The background shows a blurred form with other input fields.

STEP 10

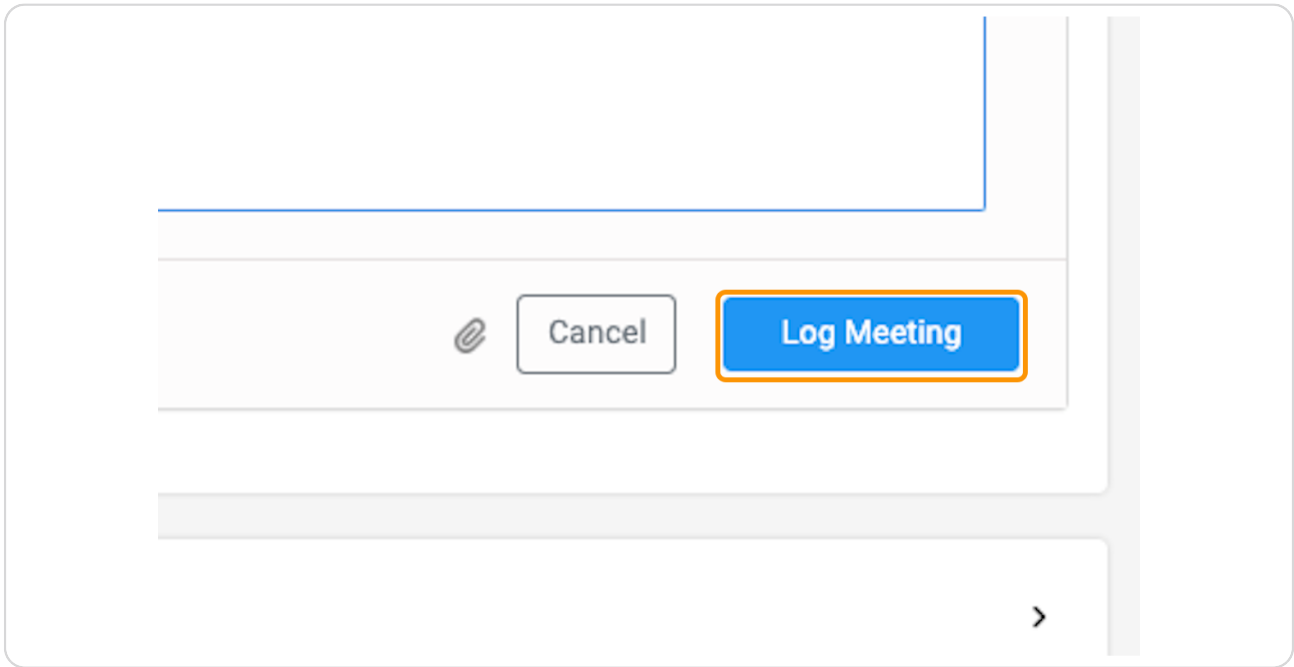
Type any description in the text editor box



A screenshot of a "Log meeting" form in the "INTERACTIONS" system. The form includes fields for "Meeting Title*" (Planning Meeting), "Meeting Date and Time*" (02/29/2024, 3:00 PM), "Duration:" (1 MM), "Meeting Outcome:" (Successful), and "Meeting Type:" (Emergency Response Planning Meeting). It also lists "Meeting Participants*" (Crescence Admin and John Hamm) and "Related Organization*" (Carbon County). At the bottom, there is a "Description:" field with a rich text editor toolbar. The text "Successful meeting to plan emergency response." is entered in the description field, which is highlighted by an orange rectangular box.

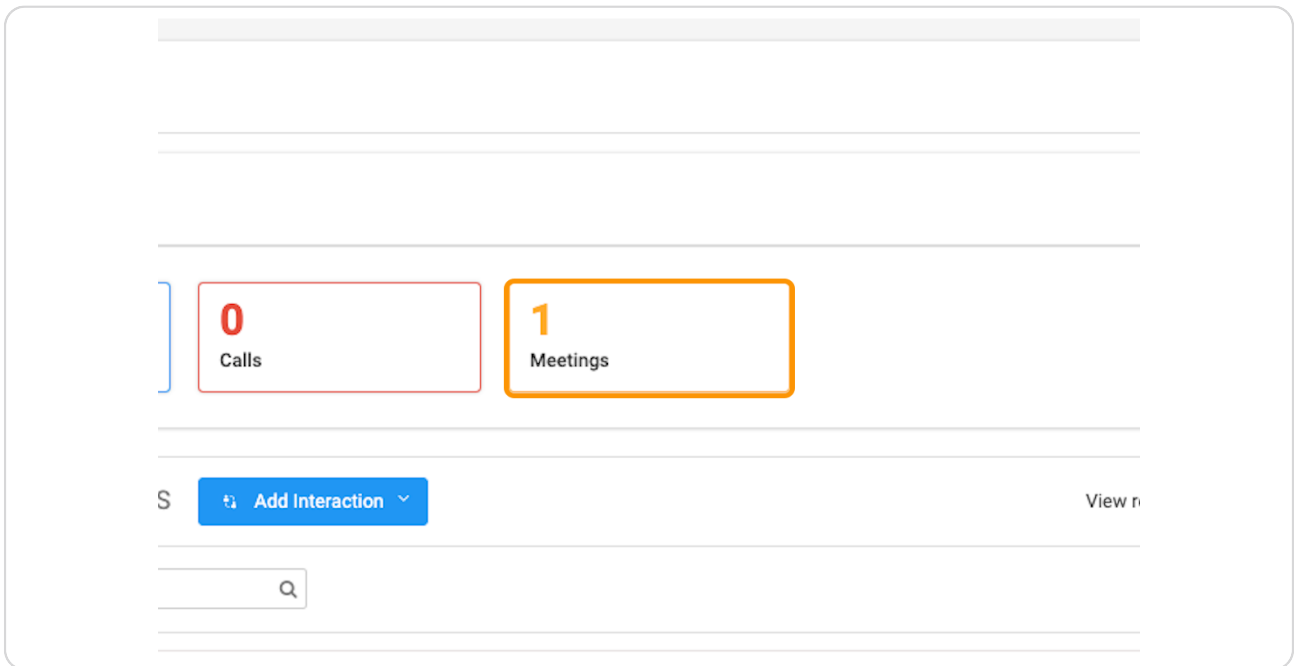
STEP 11

Click on Log Meeting when finished



STEP 12

Now you will see 1 meeting in the metrics bar



STEP 13

In the INTERACTION METRICS dash, you will see the number of interactions with this person

The screenshot shows the user profile for Mr. John Hamm. The 'INTERACTION METRICS' section is highlighted with an orange box and contains three cards: '1 Emails', '1 Calls', and '1 Meetings'. Below this, the 'INTERACTIONS' section shows a list of three interactions:

- Call: Post Meeting Question** (Feb 29, 2024 at 4:28 PM)
 - From: Crescance Admin to 2 People
 - Call Date and Time: Feb 29, 2024 at 4:00 AM
 - Call Outcome: Left voicemail
 - Duration: 0 hr 2 mins
 - Call Type: Follow-up
 - Related Organization: 2 Organizations
- Email: Emergency Planning Meeting** (Feb 29, 2024 at 4:26 PM)
 - From: Crescance Admin to John Hamm
 - Email Date and Time: Feb 29, 2024 at 3:00 AM
 - Related Organization: 2 Organizations
- Meeting: Planning Meeting** (Feb 29, 2024 at 4:25 PM)
 - From: Crescance Admin to 2 People
 - Meeting Date and Time: Feb 29, 2024 at 3:00 AM
 - Meeting Outcome: Successful
 - Duration: 1 hr 0 mins
 - Meeting Type: Emergency Response Planning Meeting
 - Related Organization: 2 Organizations

STEP 14

All interactions are listed

The screenshot shows the 'INTERACTIONS' dashboard. It features a search bar, a filter for 'Last 7 days', and 'Expand All' and 'Collapse All' buttons. The list of interactions is as follows:

- Call: Post Meeting Question** (Feb 29, 2024 at 4:28 PM)
 - From: Crescance Admin to 2 People
 - Call Date and Time: Feb 29, 2024 at 4:00 AM
 - Call Outcome: Left voicemail
 - Duration: 0 hr 2 mins
 - Call Type: Follow-up
 - Related Organization: 2 Organizations
- Email: Emergency Planning Meeting** (Feb 29, 2024 at 4:26 PM)
 - From: Crescance Admin to John Hamm
 - Email Date and Time: Feb 29, 2024 at 3:00 AM
 - Related Organization: 2 Organizations
- Meeting: Planning Meeting** (Feb 29, 2024 at 4:25 PM)
 - From: Crescance Admin to 2 People
 - Meeting Date and Time: Feb 29, 2024 at 3:00 AM
 - Meeting Outcome: Successful
 - Duration: 1 hr 0 mins
 - Meeting Type: Emergency Response Planning Meeting
 - Related Organization: 2 Organizations

